



Fidelity Investments Benefits Administration

Vendor Assessment
Report Abstract

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10 pages





Who Is This Vendor Assessment For?

NelsonHall's benefits administration vendor assessment for Fidelity is a comprehensive assessment of Fidelity's benefits administration services offering and capabilities, designed for:

- Sourcing managers monitoring the capabilities of existing suppliers of benefits administration and identifying vendor suitability for benefits administration RFPs
- Vendor marketing, sales, and business managers looking to benchmark themselves against their peers
- Financial analysts and investors specializing in the benefits administration sector.



Key Findings & Highlights

Fidelity is a financial services corporation that provides benefits administration services through its Workplace Investing segment.

Fidelity's benefits administration services offering includes DC administration, DB administration, stock plan administration, H&W administration, spending account administration, private healthcare exchange in select states, and retiree health transition services.

Fidelity has ~21,632 benefits administration clients and serves ~27.2m participants.

Scope of the Report

The report provides a comprehensive and objective analysis of Fidelity's benefits administration offering, capabilities, and market and financial strength, including:

- Identification of the company's strategy, emphasis, and new developments
- Analysis of the company's strengths, weaknesses, and outlook
- Revenue estimates
- Analysis of the profile of the company's customer base including the company's targeting strategy and examples of current contracts
- Analysis of the company's offerings and key service components
- Analysis of the company's delivery organization including the location of delivery locations.

Contents

1.	Background	
2.	Revenue Summary	
3.	Key Offerings	
4.	Delivery Capability and Partnerships	
5.	Target Markets	
6.	Strategy	
7.	Strengths & Challenges	
	7.1 Strengths	
	7.2 Challenges	
8.	Outlook	

Report Length

10 pages

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Benefits Administration Vendor Assessments Also Available for:

ADP
Alight Solutions
Conduent
Empyrean
Fidelity
Mercer
Morneau Shepell
Secova
TASC
Wageworks
Willis Towers Watson